

Custom Registration Fields

Instructions for using the custom registration fields feature.

Overview

All Design-a-Course user logins contain a first name and last name field in addition to the login ID (i.e. username) and password field. Beyond these standard account fields, you have the ability to define company-specific fields to hold data that you would like to track about your users. Such extra data might include items like the department or geographic location where they work, their supervisor's name, contact information – such as email address or telephone number. Anything that you could write down on a form about a user you can define, collect, store, and use within the Design-a-Course application.

Once defined and collected, you can use these registration fields in any way that you might use the standard name or user ID fields. You can search for students that match these extra criteria, such as all users in a particular department. You can filter reports based upon these fields, meaning that you can generate a report of all students who have failed to complete a required training program and who report to a certain supervisor. You can include this data in your reports, allowing you to have a student's contact information (phone number, email address, etc.) right there in the text of the report.

This is one of those powerful but lesser known features of Design-a-Course. This document will walk you through the steps and the options involved in creating a new registration field.

Getting to the “Manage Registration Fields” screen

The first step in defining a new registration field is getting to the “Manage Registration Fields” screen. From your favorite web browser, enter the web address (URL) assigned to your Design-a-Course account. Log in with an administrator username and password. After you are logged into your account, click the “Manage Account” button. From the “Manage Account” screen, click the “Manage Registration Fields” link in the secondary menu bar just below the page header. This will take you to the “Manage Registration Fields” screen, where you will see a list of the existing registration fields and controls to add and delete fields.

When a new account is created on the Design-a-Course system, a custom registration field for Email (i.e. user's email address) is created automatically. This data is used to implement the forgotten password feature, if that feature is enabled in your account. Modifying or deleting this field is possible from this screen; however, doing so may cause the forgotten password feature to fail to work properly. You should not change this Email registration field if you plan to allow students to request that their password be sent to them via email.

Adding and deleting registration fields

To delete one or more registration fields from your account, navigate to the “Manage Registrations Fields” screen (see previous section) and select the fields you wish to delete by placing a check mark in (i.e. clicking on) the box next to the desired field. There are links at the top of the page to select all fields or un-select all fields. Once you have selected the fields you wish to remove, click the “Delete Selected Fields” button.

To add a new registration field, simply type a name for the field in the space labelled “Field Name:” and click the “Add New Field” button.

Editing registration field properties

Each registration field listed on the “Manage Registration Fields” screen will have an “edit” link after the field name. To set or change properties of a registration field, begin by clicking on this link.

Renaming the field

To change the name of the field, type the new name into the space labelled “Name:”

Note: Renaming the Email registration field will interfere with the forgotten password feature of Design-a-Course.

Setting a validation pattern

Some data has an expected pattern, such as a telephone number that is usually three digits, followed by a dash, followed by three more digits and another dash and four final digits. Maybe your department names or internal mailstop designations have a certain pattern, such as some number of letters followed by some number of digits. Validation patterns allow you to specify this pattern and validate user input against the pattern. By adding a validation pattern to your registration field, you increase the likelihood that entered data will be correct.

Validation patterns use an industry standard known as “regular expressions” to define the pattern. An explanation of regular expressions is beyond the scope of this document. You can find an explanation of them on [this Wikipedia page](#). However, understanding regular expressions is not required to use this validation pattern feature in Design-a-Course registration fields. Just call our support line or email our support address and describe your pattern. We will write the regular expression for you.

Once you have the regular expression representing your validation pattern, type it into the space labelled “Validation Pattern:”

Required fields

Registration fields may be marked as required, meaning that a new user account is considered incomplete if a value is not provided for that field. This can be very useful if

you want to ensure that you have a value in this field for every user in your account. Check the box labelled “Required:” if you wish to make a registration field required.

Note: To make an existing registration field required you must first ensure that every existing user record in your company account has a value entered for that field. If not, you will get an error message similar to this:

The field cannot be required until 2 existing users have entered a value for this field. The first user who is lacking a value is dsmith.

Protected fields

In general, any user can click on the “USER PROFILE” link in the lower left corner of any Design-a-Course screen and change the data contained within their custom registration fields. There may be times when you do not want this to happen. For example, you might run periodic compliance reports by searching for users with a certain department field value who have not completed required training. A student could prevent himself from showing up on that report by going into his user profile and changing the value of his department name registration field.

By marking a registration field as protected, you allow admin users to change the value in this field, but prevent the student user from making such a change.

Applying your changes

Once you have entered all of your changes for this registration field, click the “Submit” button to apply your changes.

If you have a special situation where you need to modify user data, and don’t see a way to safely do it, please submit a support request and we will do all that we can to help.